

# LIMITLESS Coaching Call Transcript

MARCH 23<sup>RD</sup>, 2022  
VALUE U RETREAT  
HNW PROSPECTING

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00:04:13.020 --> 00:04:23.490

Lisa Vander: Alright, everyone, we are at 1247 so starting a couple minutes late, but not too late, we do have quite a bit of time together to talk about high net worth prospecting.

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00:04:24.420 --> 00:04:34.290

Lisa Vander: before we jump into it, I wanted to introduce myself i'm tiffany Charles I own wealth management firm destiny capital and entrepreneur aligned.

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00:04:35.130 --> 00:04:49.050

Lisa Vander: started as a private client with stephanie when in 2017 and then join the limitless program from the start, so she as she was alluded to came out of retirement I started writing for the investment news.

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00:04:49.650 --> 00:05:02.790

Lisa Vander: About two articles in I was like who are you I need your help i'm failing miserably I have no idea who I am and I am just in this really bad place and she responded and said, I am taking private clients.

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00:05:03.750 --> 00:05:11.850

Lisa Vander: So that's where the journey started stephanie Bruno is here to present with me do you want to share a little bit about yourself and then i'll share how we know each other.

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00:05:12.330 --> 00:05:24.570

Lisa Vander: yeah I think i've met a lot of you so steph Bruno I was in the inaugural class with tiff years one into I had my own firms up financial advisors.

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00:05:25.050 --> 00:05:30.060

Lisa Vander: And I grew that firm and then last year I emerged that firm into mission wealth so.



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Lisa Vander: You know we're here just to talk about how we were able to implement a lot of things from limitless that were really helpful to us.

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00:05:37.200 --> 00:05:42.330

Lisa Vander: and show you that there is a path in and that there are great things you can learn here and do.

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00:05:42.600 --> 00:05:53.820

Lisa Vander: And really just try and be helpful to you as you're navigating all of this, so that's our goal today is to give you the information that we think was most helpful to us in growing our businesses and making them successes.

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00:05:54.180 --> 00:06:04.290

Lisa Vander: But also make sure we answer all of your questions as well too yeah and a big part of that success is utilizing the limitless Community so steph and I.

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00:06:04.980 --> 00:06:12.630

Lisa Vander: We went on the Costa Rica trip after the very first year so after the first year stephanie began.

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00:06:12.960 --> 00:06:23.640

Lisa Vander: And limitless team looks like who's up for coming to Costa Rica, in January and spending time together and going really deep, we had the beautiful ELISE mcconnell who has no longer with us.

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00:06:24.390 --> 00:06:33.630

Lisa Vander: However, life coach who was down there with us to just deepen who we are, what we do, how we do it and be very authentic and how we come together.

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00:06:33.990 --> 00:06:41.550

Lisa Vander: And so we got to just come together and get really vulnerable about like where where we're doing well, where we're not and.

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00:06:42.210 --> 00:06:52.440

Lisa Vander: Sometimes at these conferences there's a level of like it can feel surrogacy or the people really have it together and you go down, and you get time with one another and you're like oh my God.

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00:06:53.340 --> 00:07:01.950

Lisa Vander: Like none of us have it together we can be have it all together if we just come together and we got to do those affirmations circles, and here we are years later.

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00:07:02.430 --> 00:07:15.570

Lisa Vander: We still meet monthly with our entire Costa Rica crew there's 1313 of US 13 of us, I like to joke that part of it was bribery for re enroll and, as you can imagine the first year was a new year, and there are little hiccups.

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00:07:17.070 --> 00:07:27.360

Lisa Vander: But it was a great group yeah, and so we also go on TRIPS annually together as a mastermind group this year we're doing some wineries there was Santa fe last year.

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00:07:27.900 --> 00:07:34.050

Lisa Vander: Is Denver, the year before there's definitely hopefully Costa Rica or redo in our future.

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00:07:34.800 --> 00:07:45.510

Lisa Vander: But the Community so powerful we lean on each other for everything we share resources what's happening in your business, how are you letting go this client, what are you doing here how did that merge happen, what happened there.

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00:07:46.380 --> 00:07:51.540

Lisa Vander: We can trust each other before events happen like we can trust each other, after events happen.

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00:07:52.110 --> 00:08:00.750

Lisa Vander: So there's such power in this room to building your business, it could be real lonely to build what we're building and it's can be very overwhelming.

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00:08:01.740 --> 00:08:10.290

Lisa Vander: And maybe your spouse doesn't get it, maybe your business partner doesn't get him your



employees don't get it, but your your group does your Community does here so what's.

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00:08:10.590 --> 00:08:19.050

Lisa Vander: really great about limitless is the power of the Community and your masterminds so tomorrow is a really big day on masterminds and continuing to develop that.

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00:08:19.920 --> 00:08:27.600

Lisa Vander: But we first see that Stephen I actually have a second one, and which was like a mastermind so we have the Costa Rica one, and then we had our mastermind.

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00:08:27.870 --> 00:08:36.120

Lisa Vander: And that now meets quarterly years after several are no longer a part of the program or Evan flow based on like refinement in.

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Lisa Vander: Implementation wherever they're at in the journey but we come together on a quarterly basis of like what's happening in your business, how can we help one another, like Google docs sharing like you name it.

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00:08:47.580 --> 00:08:55.350

Lisa Vander: we're there and so i'm just yeah that's how we know one another and we're super excited to be up here to present with you.

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00:08:55.620 --> 00:09:06.750

Lisa Vander: On high net worth prospecting and do it together and we both kind of acknowledge the fact it's not very often the two females and wealth management get to do something like this, so we're also excited to be wrapping that as well.

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00:09:08.100 --> 00:09:13.620

Lisa Vander: Alright, so high net worth prospecting market yes hi.

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00:09:25.620 --> 00:09:27.120

Lisa Vander: How are you gonna make them brubeck.

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00:09:28.920 --> 00:09:30.090

Lisa Vander: Just trusting his word.

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00:09:33.360 --> 00:09:34.050

Lisa Vander: i'm.

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00:09:35.430 --> 00:09:45.480

Lisa Vander: Market marketing efficiency results by strategy so when we're thinking about prospecting all strategies work you can't do all strategies.

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00:09:45.930 --> 00:09:55.980

Lisa Vander: And when you think about size of firm typically in like solo type firms, you see a majority like over 50% to 60% coming through client referrals.

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00:09:56.310 --> 00:10:02.130

Lisa Vander: And Center of influence referral so referral heavy and then there's a little bit of business development there, there could be.

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00:10:02.520 --> 00:10:08.460

Lisa Vander: Some seo there could be some webinars seminars those types of things podcasting.

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Lisa Vander: And as you grow into samba and enterprise, you see that starting to shift a little bit where maybe client referrals and Center of influence referrals is going down somewhere between 30 to 45%.

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Lisa Vander: While business development, and all of those broader categories is starting to play a.

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Lisa Vander: Larger world we're definitely seeing that in like custodian referrals for some of those enterprises like that's starting to take a huge momentum in business development there we're also seeing a lot more obviously in podcasting and digital means.

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00:10:38.850 --> 00:10:48.600



Lisa Vander: But what this is showing is there's a lot of ways in which you can do your marketing there's a physical efficiency related to it and revenue per client.

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Lisa Vander: And so there's a matter of thinking about when you're doing high net worth prospecting where and how you're spending your time.

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00:10:55.920 --> 00:11:06.030

Lisa Vander: And community and personal connections starts playing a huge role in what you're looking for when it comes to connecting with higher wealth or ultra wealth.

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00:11:06.780 --> 00:11:16.440

Lisa Vander: Because your experience matters and the ability to build trust is different than just having a podcast right and just.

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00:11:17.130 --> 00:11:26.940

Lisa Vander: sending out some client communication showing up to an event their complexities are different and they're really looking it's a slower trust build So how are you consistently.

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00:11:27.210 --> 00:11:35.130

Lisa Vander: giving you know the credits to that trust equity and that relationship equity to the higher net worth prospects so.

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00:11:35.880 --> 00:11:48.330

Lisa Vander: You really start looking into Community and the experience economy very differently and then others pieces just becomes supportive of that prospecting do you have anything to add okay.

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00:11:50.340 --> 00:11:54.450

Lisa Vander: And so passion prospecting and this is.

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Lisa Vander: The session is also about as we started alluding to the niche and where you really like to be passion prospecting shows that really well in high net worth So what do you enjoy doing.

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00:12:06.930 --> 00:12:20.760

Lisa Vander: And how do you that you then create the communities and opportunities there so, for instance there's an advisor out in Colorado and he really, really enjoys fishing and he flies to Montana.

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Lisa Vander: And he is with the ultra high net worth and he spends his weeks on ranch's fishing, do you know how long people fish for.

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00:12:29.520 --> 00:12:43.380

Lisa Vander: Our words like he is with them for seven to eight hours, what do you think is coming up in those conversations right he any any of those trips he's coming back with 1020 \$30 million clients and he also is.

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00:12:44.550 --> 00:12:52.290

Lisa Vander: really trying to think of the we go to it every year how's the farm animals at the Convention Center yes.

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00:12:54.030 --> 00:13:00.930

Lisa Vander: When I was pregnant, I used to play this game, where I was like you know it's like attached to the House your doors and you put your car in it and, like the garage i'm like yes.

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00:13:02.250 --> 00:13:13.740

Lisa Vander: he's my mind, but the stock show like he's super passionate about like the farming and how this whole structure was sits on the board, do you know who else sits on the board of the stock show super high net worth people.

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00:13:14.130 --> 00:13:25.080

Lisa Vander: And you know who else like brings their animals and wants those connection really high net worth so passion and prospecting like how are we bringing those things together, you know i'll just add I was a.

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00:13:25.740 --> 00:13:29.970

Lisa Vander: Really passionate about women's issues and women's economic security.

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00:13:30.300 --> 00:13:40.860



Lisa Vander: My mom had no economic power so she raised me to be very financially self sufficient So when I was at a position where I could volunteer I started volunteering with the women's foundation of Colorado I.

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00:13:41.190 --> 00:13:50.730

Lisa Vander: Had a practice in Colorado i'm in Seattle now and really through those relationships I eventually first of all, I was on the investment committee so that was one thing I did.

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00:13:51.240 --> 00:13:57.300

Lisa Vander: and early on, I didn't really get a lot of referrals from people involved with that organization, but.

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00:13:57.720 --> 00:14:09.840

Lisa Vander: The investment advisor for the investment committee had a practice where they mainly worked with foundations and endowments they wanted referring a lot of great private clients to me and that's just a relationship of trust.

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00:14:10.530 --> 00:14:23.250

Lisa Vander: And he's still refers great private clients to me today and then also you know I eventually went on the board of that foundation and a lot of my clients that I met, I met through just doing really good work, not by showing up and saying hey.

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00:14:23.790 --> 00:14:31.170

Lisa Vander: i've got this practice let's do this, but we just happen to work together, and then we you know from that relationship it starts to bud.

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00:14:31.500 --> 00:14:39.510

Lisa Vander: yeah remember it's not about selling it's about serving so as you're really thinking about what you're passionate about how you're going to show up.

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00:14:39.930 --> 00:14:48.180

Lisa Vander: it's about how you're in service of there and the opportunities naturally come you always get your opportunity to say what you do and how you do it, and what you're passionate about.

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00:14:48.480 --> 00:14:52.170



Lisa Vander: And it's great when you're in environments that that those passions collide.

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00:14:52.830 --> 00:14:59.250

Lisa Vander: So we really need to think about who who are we, like what excites us where do we like to be how do we like to spend our time.

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00:14:59.730 --> 00:15:04.590

Lisa Vander: I am not going to huge networking events anymore, I never liked it.

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00:15:05.070 --> 00:15:13.170

Lisa Vander: And it was always told to me right, like when you start who are your natural hundred you need to cold call them i've knocked on doors i've cold called i've done all that stuff.

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00:15:13.440 --> 00:15:23.640

Lisa Vander: First of all, it's not where you're finding high net worth prospects right, you may stumble upon one, but then, how are you building a relationship equity but number two I hated it.

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00:15:24.210 --> 00:15:32.940

Lisa Vander: I was going into those things and I was trying to find a way to get out, you know what I love saying i'm a financial advisor because it was like the plague, it was like I was carrying it and I didn't have to answer anything else right.

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00:15:33.300 --> 00:15:39.750

Lisa Vander: Like how was I ever going to grow business that way, so I needed to find a place where I was like what am I really passionate about similar.

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00:15:40.020 --> 00:15:51.450

Lisa Vander: To stephanie I am really passionate about women and even more so now that i've grown into entrepreneurship myself women entrepreneurs so i'm finding places that they go to and it gets be.

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00:15:51.900 --> 00:15:56.610

Lisa Vander: quickly the, how do you get exposure it naturally starts happening because you're like.

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00:15:56.910 --> 00:16:10.860



Lisa Vander: exuding your passion and somebody like you know who you need to know you need to know this person, you know what you know you need to go participate, you need to go participate over here well how do I do that Oh, let me make the introduction, for you like when you're clear the doors open.

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00:16:11.910 --> 00:16:17.550

Lisa Vander: And then obviously you have to remain committed so anything from a marketing or prospecting standpoint is not an event.

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00:16:18.480 --> 00:16:29.160

Lisa Vander: it's a habit, do you know investment bankers their average pipeline is 10 years before they are in the business they nurture that pipeline for 10 years in order to get the opportunity to sell a business.

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00:16:29.490 --> 00:16:37.530

Lisa Vander: Ours is not having to be that long, but it is a process, it is a habit it's not like i'm just going to go and meet this person and be like hey.

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00:16:38.220 --> 00:16:53.700

Lisa Vander: Your entire network i'm a trusted advisor give it to me right, like there's a level of like how am I coming and service to the things that they are also passionate about that they see me as that trusted person that they've been to would allow us the opportunity to help them personally.

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00:16:54.900 --> 00:17:01.470

Lisa Vander: And then traditional seo is just again thinking about the referral basin and growing traditional seo is.

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00:17:02.160 --> 00:17:08.520

Lisa Vander: Just check out the lessons there, but like similar to how you would approach passion prospecting the coi is is just a matter of.

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Lisa Vander: Are you clear on who you're serving and then getting and then creating the system in order the messaging in order to let your see always now and then knowing where they're showing up.

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00:17:18.900 --> 00:17:26.280

Lisa Vander: Do any of your passions align their or is there, something in which you can be in service to your CEO is to allow them to show up in the space that they want to.

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00:17:26.610 --> 00:17:37.110

Lisa Vander: A lot of the prospecting that I do is literally connecting thing outside of wealth management like understanding their pain points are opportunities and finding ways to help them.

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00:17:39.720 --> 00:17:42.780

Lisa Vander: So this is awkward like i'm like there's me.

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00:17:44.970 --> 00:17:56.460

Lisa Vander: When I was thinking about who I am and what I was really excited about entrepreneurship mindfulness i'm in life coaching i'm with other brilliant women it's called brilliance who care about living a good life.

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00:17:56.910 --> 00:18:09.030

Lisa Vander: and making an impact multiplier in the spaces, that they are i'm really into Community organizing I love to just connect people and connect things so that the Community grows and people feel seen and heard.

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00:18:09.900 --> 00:18:19.500

Lisa Vander: Family events i'm a soccer coach like I think it's super important to like get time with my kids and show up wherever they are i'm volunteering at school, when I can and.

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00:18:20.190 --> 00:18:29.910

Lisa Vander: Women causes i'm super super passionate about breaking some ceilings for women and making it easier on the next generation of women as the generation before me did.

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00:18:31.140 --> 00:18:40.170

Lisa Vander: Investment groups on this tends to be female oriented for me as well, but i'm a part of a lot of women entrepreneurship groups who are looking to become.

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00:18:40.560 --> 00:18:49.110

Lisa Vander: and provide funding for more women entrepreneurs it's just really severely underfunded it's



under 2% and there's more that needs to be done there so.

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00:18:49.320 --> 00:18:57.930

Lisa Vander: Like How are they starting those groups and what can I give given the experience I have in being an entrepreneur myself in wealth management and how to build those funds.

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00:18:58.290 --> 00:19:07.080

Lisa Vander: And then I love traveling and so like travel groups and real estate investment groups and all of those things that come together, like I love all of that stuff so.

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00:19:08.040 --> 00:19:20.880

Lisa Vander: When I think about all that i'm like energized to show up to those spaces and give and as i'm looking at those things they've grown over time where maybe it started out with.

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00:19:22.560 --> 00:19:29.160

Lisa Vander: Like they're just all groups that evolved over time, where they had more opportunities to give they had more wealth they're tied to more people.

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00:19:29.400 --> 00:19:40.800

Lisa Vander: Their natural influence grew which created more influence, but we're all bound in a way to open doors for one another and that can be true in anything that you're passionate about sports.

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00:19:42.030 --> 00:19:50.640

Lisa Vander: Animals like investment groups people, whatever it looks like but where do the people that you want to attract hang out.

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00:19:51.450 --> 00:20:01.560

Lisa Vander: What are they interested in what are they reading, how are they reading that How are they taking them that information, these are all really good things to know about your high net worth prospect.

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00:20:01.980 --> 00:20:05.430

Lisa Vander: Do you have any where do you what are you passionate about well.

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00:20:06.120 --> 00:20:14.580

Lisa Vander: So women's economic security, and one of the other areas, especially as a business owner and also serving on Community boards is.

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00:20:14.850 --> 00:20:25.230

Lisa Vander: Working on my leadership skills, so I actually did a lot of the programs for through the Denver metro Chamber leadership foundation, so they have leadership Denver, they also had Colorado civic DNA is.

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00:20:25.650 --> 00:20:29.220

Lisa Vander: I have to tell you a lot of those people became my clients because.

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00:20:29.610 --> 00:20:39.030

Lisa Vander: They were all programs, where we got to know each other as people and we trusted one another and then, when they had a knee they're like oh steph can help I know her, and I really trust her.

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00:20:39.360 --> 00:20:46.560

Lisa Vander: So, again it's going to be passion you can't fake that I mean you got to want to be able to go through those programs or have a need to go through.

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00:20:46.860 --> 00:20:55.980

Lisa Vander: But when I look back at that, I mean there are also people I really enjoy too, so it just to me it's like oh gosh what a privilege to be able to help serve these people and.

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00:20:56.580 --> 00:21:06.930

Lisa Vander: They are great clients and they also refer a lot of other people and they tend to refer other classes of leadership Denver right, so there was a big competition leadership Denver.

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00:21:09.000 --> 00:21:20.190

Lisa Vander: But they they tend to refer other people as well too so keeping that in mind also look at your sometimes your spouse's networks for my spouse runs a private school so now i've got.

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Lisa Vander: Ironically, a couple of heads of school as clients as well, too, so you know, think about the place where you're just naturally meeting people as well.



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00:21:29.370 --> 00:21:36.810

Lisa Vander: And that could be something to think about too, I know, Adam talks a lot about his wife and they built a career around her career so yeah.

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00:21:37.440 --> 00:21:51.870

Lisa Vander: Like the family events is like a big one i'm naturally just meeting people and getting curious about them on the soccer field hockey like ice time is a hard time so like you know, after a coffee or two then i'm starting to connect to them, but.

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00:21:53.070 --> 00:21:57.600

Lisa Vander: You know who else does it really well so street or see President CEO.

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00:21:57.930 --> 00:22:15.240

Lisa Vander: President not see what he gave up being CEO so he's founder founder he does have mission wealth on, but he does life planning like he's super passionate about he does a lot of really cool things like he has a lot around like the water and ensuring clean.

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00:22:16.530 --> 00:22:26.160

Lisa Vander: Clean ocean and all of those types of things, but he does this life planning, in which he is a part of Eo the entrepreneur or wife to.

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00:22:26.760 --> 00:22:31.080

Lisa Vander: The young Presidents organization and he goes around and he just does life planning with them.

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00:22:31.470 --> 00:22:40.770

Lisa Vander: But you know, like you know he gets a lot of opportunities to serve by P O Members across the globe, because he's just so passionate about making them.

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00:22:41.250 --> 00:22:56.820

Lisa Vander: live their best life and had built an entire curriculum around that totally outside of wealth, management and he gets a ton of opportunities for mission wealth to bring in clients that they love to work with, and so you just really looking and leaning into those passions.



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00:22:58.650 --> 00:23:05.070

Lisa Vander: Speaking of that in your workbook we have a place where you can start exploring that today, so that you don't go home.

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00:23:06.450 --> 00:23:19.500

Lisa Vander: Just hearing this but really taking the moment on who you are what you enjoy where would those you know what type of clients you enjoy working with and then, how do those things come together.

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00:23:20.250 --> 00:23:25.920

Lisa Vander: How do they come together, from a personal perspective, how did they come together from a broader group.

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00:23:27.060 --> 00:23:39.570

Lisa Vander: Again, what are they reading what are they listening to what do they enjoy like just all of those things so that you can start looking into how do you start showing up in the world of the clients that you want to be serving.

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00:23:41.850 --> 00:23:47.550

Lisa Vander: will take some time at the end to actually work through that and but feel free to ask questions along the way to okay.

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00:23:49.410 --> 00:23:49.860

Lisa Vander: All right.

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00:23:51.330 --> 00:24:05.580

Lisa Vander: So, again, there can be a lot of areas in which you can focus here on this all comes down to the niche so thinking of the events that happen in each one of these individual lives that you're specializing in so what events happen in business owners that.

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00:24:06.180 --> 00:24:11.280

Lisa Vander: Possibly could be somewhere that you're showing up with them independent women retirees professionals.

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00:24:11.580 --> 00:24:19.290

Lisa Vander: The life events matter because that's where feeling emotion and pain points and possibilities come into play so listing all of those out.

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00:24:19.650 --> 00:24:29.970

Lisa Vander: And then also finding the area in which you're like I have that down better than anyone or I want to have that down better than anyone and i'm going to develop something around that i'm going to show up in that space.

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00:24:30.510 --> 00:24:40.740

Lisa Vander: Right, so when we were exploring business owners earlier, there was a level of like Is it the 45 year old or the 75 year old a 75 year old cares a lot more about exit in succession.

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00:24:41.010 --> 00:24:46.380

Lisa Vander: But the 45 year old cares more about equity planning and continuity right like different things.

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00:24:46.680 --> 00:24:55.380

Lisa Vander: In which you're looking to show up where they would go to get the information, who they're hanging out with in order to feel connected to our different.

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00:24:55.710 --> 00:25:04.020

Lisa Vander: So you want to know the LIFE events that are happening in the people that you're serving so you can determine you only have so many hours.

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00:25:04.350 --> 00:25:14.550

Lisa Vander: And all the strategies work you can't work all the strategies, so you need to be really clear on which ones you're choosing to invest your time in so that you're not spending your time.

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00:25:19.890 --> 00:25:35.100

Lisa Vander: And so passion prospecting process as we talked a little bit earlier about trust equity and relationship equity you're making debits or credits to that relationship or that equity at any given point and passion prospecting is a lot more than just.

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00:25:36.630 --> 00:25:41.700



Lisa Vander: I run a wealth management firm and you should trust me because we've been in business for 40 years right like.

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00:25:42.030 --> 00:25:55.110

Lisa Vander: it's so much more than that, how do you show up and authentically connect how do they know that you know what it's like to be in their shoes, how do they know that you're better than Goldman Sachs right like working with.

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00:25:55.470 --> 00:26:07.980

Lisa Vander: entrepreneurs and business owners and they have events and liquidity is happening we're competing against that, like what do we have to offer when they lower the banking rate, you know what does that look like, how are we really developing those relationships.

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00:26:09.990 --> 00:26:10.860

Lisa Vander: So one.

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00:26:12.210 --> 00:26:15.240

Lisa Vander: Go ahead, no, I was gonna say connecting authentically.

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00:26:15.990 --> 00:26:23.280

Lisa Vander: Again, when you're able to show up in places that you love to show up to you can connect authentically I don't go to my brilliance group.

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00:26:23.550 --> 00:26:31.170

Lisa Vander: and talk about like how i'm helping clients like I go there and i'm also a female executive participant of it.

141

00:26:31.380 --> 00:26:39.810

Lisa Vander: Looking to better my life and be participating in the life coach i'm doing the meditation with them i'm going through it and i'm just naturally connecting.

142

00:26:40.470 --> 00:26:49.110

Lisa Vander: But they know what I do and I often get the question of I have this happening in my business can we go grab a coffee and can you help me hey i'm not sure if i'm your client.



143

00:26:49.710 --> 00:26:58.350

Lisa Vander: What does that look like, how can you can, how do you help me or how do I know i'm ready for you, those questions are naturally coming up entrepreneurship true space.

144

00:26:58.800 --> 00:27:03.930

Lisa Vander: And it's a community that focuses on entrepreneurs who are at a \$3 million.

145

00:27:04.410 --> 00:27:09.090

Lisa Vander: revenue and they want to scale to 10 and they spent all this time doing research.

146

00:27:09.360 --> 00:27:18.900

Lisa Vander: And \$15 million to develop like how you get there, what did the companies that were successful, to do it, what did they change so they weren't in the coldest aka state in 3 million.

147

00:27:19.170 --> 00:27:27.270

Lisa Vander: Because it becomes enduring after that, in order to succeed, that community, even though they only accept five new members, a month.

148

00:27:27.990 --> 00:27:35.850

Lisa Vander: Totally entrepreneur alliance community, so I go to the owner and I have a conversation with them, and I was like wow really seems like you're doing great things here like.

149

00:27:36.090 --> 00:27:41.970

Lisa Vander: Not only is my business in this place and I want to learn like we're a \$4 million firm looking to be 10 million in three years, like.

150

00:27:42.210 --> 00:27:45.390

Lisa Vander: I want to learn from you and I want to understand your research and I want.

151

00:27:45.690 --> 00:27:52.800

Lisa Vander: To be able to be a value part of the Community, where we can help and give away the information we are because traditional wealth management has failed entrepreneurs.

152



00:27:53.130 --> 00:27:57.240

Lisa Vander: And here's this nut and he's like oh my gosh we totally need to be doing this together.

153

00:27:57.630 --> 00:28:05.370

Lisa Vander: we're a paying Member, so that we get the opportunity to be a part of that it was an investment we're willing to make because I know the cost of client acquisition.

154

00:28:05.940 --> 00:28:15.090

Lisa Vander: I know exactly who they're bringing in and the qualifiers there and that they're good clients i'm around 90% of the people in that room or our ideal clients.

155

00:28:15.690 --> 00:28:25.230

Lisa Vander: that's a room, I want to invest in and be a part of I can't go there and be like hey i'm your wealth management person, I have to meet every one of these entrepreneurs be like we're in the same place.

156

00:28:25.860 --> 00:28:32.880

Lisa Vander: having the same human capital problems I need to become a more predictable business as well, like how are you doing that in your business, what are you doing.

157

00:28:33.150 --> 00:28:37.260

Lisa Vander: was interesting how are you funding that what does that look like from a capital structure from behind.

158

00:28:37.710 --> 00:28:46.350

Lisa Vander: And then they start asking her advice on that capital structure and we're starting to be able to give tidbits of that never soliciting or selling i'm participating as a Member.

159

00:28:46.920 --> 00:28:58.710

Lisa Vander: And I have authentic connection and genuine similar needs to what they're solving and then I happen to have the expertise to solve it on a personal side enough, the business side and we get to connect those dots.

160

00:28:59.310 --> 00:29:02.790

Lisa Vander: So it's really brilliant place to be how about some of yours.



161

00:29:03.570 --> 00:29:08.610

Lisa Vander: Well, I was just going to add, you know, I was sort of like tiffany like prospecting was sort of like you just feel like.

162

00:29:08.850 --> 00:29:19.170

Lisa Vander: You don't want to be that you know sell tell your friends and family or give me 10 names, so I almost went the opposite way you know at first in my firm I was like you know didn't want to sell.

163

00:29:19.590 --> 00:29:25.470

Lisa Vander: And so, one of the things that really helped me as I went through the CG coaching for the fluid program and one of the.

164

00:29:25.770 --> 00:29:37.200

Lisa Vander: Things that they have that I think it's it's not quite as naturally authentic, but it is authentic processes, you know if you have a niche that you serve or group that you think you want to serve so say you want to serve.

165

00:29:38.100 --> 00:29:51.330

Lisa Vander: dentist for some reason the the process that they suggest is that you approach people from a research standpoint and say you know I have these clients and I want to better understand.

166

00:29:51.600 --> 00:29:57.330

Lisa Vander: How, what are the financial challenges that dentist face or it could be, you know attorneys in Washington DC.

167

00:29:57.660 --> 00:30:03.960

Lisa Vander: Whether unique financial challenges you face Would you mind sitting down with me for 30 minutes and having a conversation.

168

00:30:04.290 --> 00:30:08.970

Lisa Vander: And when you get that meeting, first of all i'd never had anybody turned me down, sometimes it took a while to get scheduled.

169



00:30:09.270 --> 00:30:17.370

Lisa Vander: But whenever we had one of those meetings I went to them with you know I probably had 10 questions usually only got through five.

170

00:30:17.700 --> 00:30:28.320

Lisa Vander: But they were very specific questions, and you know I actually told them look i'm going to compile this information and write an article on I will send it, you know when you're done it's perfect for blogging and other things, to make you an expert.

171

00:30:28.920 --> 00:30:34.500

Lisa Vander: But what happened is not right away when you when you go into those meetings you're not allowed to sell you, you do not.

172

00:30:34.830 --> 00:30:45.900

Lisa Vander: sell one bit you don't even talk about your firm they may ask, and you say Okay, this is not really about that I will send you some information, but really I just want to talk to you today about your needs and what you're doing.

173

00:30:46.320 --> 00:30:50.010

Lisa Vander: But then they realize through the questions that you're asking.

174

00:30:50.460 --> 00:30:56.580

Lisa Vander: That that you are approaching them much more differently than the people who are just trying to sell them something you are a value them as a person.

175

00:30:56.820 --> 00:31:01.710

Lisa Vander: And I will tell you I didn't get a lot of those people as clients right away, but when I look back.

176

00:31:02.100 --> 00:31:09.780

Lisa Vander: A lot of them became clients when they had a need, they came to me because we already had a trusted relationship at that point in time and, of course.

177

00:31:10.020 --> 00:31:15.930

Lisa Vander: You know I kept up with those people, I might add, them ask them if it's okay I add them to



my newsletter or if I had an article that I thought.

178

00:31:16.260 --> 00:31:26.880

Lisa Vander: You know, especially if I published the blog where I did this piece I would send that to them, so that to me was a much more natural way to get in front of people authentically and do that.

179

00:31:28.080 --> 00:31:36.540

Lisa Vander: I think we will talk about a few more so i'll save those as well yeah and that she just said, like the trust equity there right like your job is to plant those seeds.

180

00:31:36.900 --> 00:31:46.860

Lisa Vander: and water it like I don't jump into this thinking i'm the new guy like i'm like Oh, like the big tree space events coming up in April, like I need to walk away with five new clients.

181

00:31:47.160 --> 00:31:53.400

Lisa Vander: Like that's no longer the goal i'm like how many genuine seeds, can I plant where they're calling upon me or we're creating.

182

00:31:53.820 --> 00:32:00.210

Lisa Vander: An additional connection like, how can I be in service of five people there that it's so valuable that they remember who we are.

183

00:32:00.480 --> 00:32:10.740

Lisa Vander: And what we do right like what am I doing to do that, and a lot of times it's just getting curious about where they're at and making a connection to somebody else a lot of my growth in.

184

00:32:11.760 --> 00:32:15.930

Lisa Vander: Securing high net worth clients has literally just become opening doors to other people.

185

00:32:16.290 --> 00:32:32.250

Lisa Vander: Because i'm like Oh, you have that need so this person totally over here consults like I have nothing to do with it it's just the connection standpoint so again that relationship equity like how do I deposit as much as I possibly can, and plant those seeds and the opportunities arise.

186



00:32:33.420 --> 00:32:34.500

Lisa Vander: verge did you have a question.

187

00:32:42.810 --> 00:32:50.310

Lisa Vander: So I find that I am competing a lot against banks that are both management divisions and warehouses and.

188

00:32:51.540 --> 00:32:58.830

Lisa Vander: I feel, like most competing against big budgets marketing budgets, they host events that are well penetrated.

189

00:33:00.270 --> 00:33:05.790

Lisa Vander: You know so they're just kind of all over, and so the challenge, I have is how do I position myself.

190

00:33:08.040 --> 00:33:14.010

Lisa Vander: You know, sometimes I don't know if i'm should compete on price should should compete on experience.

191

00:33:14.580 --> 00:33:19.890

Lisa Vander: I mean the role that I played with a lot of the the early stage founders i'm working with this, you know i'm playing the.

192

00:33:20.370 --> 00:33:29.220

Lisa Vander: role the door opener right now yeah but there's but beyond that, like there's some uncertainty over were eligible end up, so I just that's kind of where I feel like.

193

00:33:29.670 --> 00:33:40.140

Lisa Vander: I don't know what kind of experience i'm actually giving them sure how are you receiving that feedback, or is there a way that you're deepening that those relationships outside of.

194

00:33:40.500 --> 00:33:54.720

Lisa Vander: i'm opening doors for them really attempt to see them like quarterly or at least semi annually yeah you know grabbing coffee grabbing lunch whatnot you know what's the update you know we're in you know they're always enthusiastic talk about the company and whatnot yeah and then.



195

00:33:56.880 --> 00:34:02.820

Lisa Vander: You know now let's make the offer to you know, is there, another you know someone to to introduce you to type of thing sure.

196

00:34:03.930 --> 00:34:05.820

Lisa Vander: yeah it sounds like so I.

197

00:34:06.870 --> 00:34:15.090

Lisa Vander: I don't think that you're looking to necessarily compete on price um So when I hear that i'm like they're always going to have a bigger budget than we are.

198

00:34:15.390 --> 00:34:21.780

Lisa Vander: they're always going to have those 25 bits off the mortgage that we can offer right like the SBA loan or whatever it looks like.

199

00:34:22.080 --> 00:34:30.390

Lisa Vander: how's that showing up it, but what we're looking to do is like what's your key messaging around that that creates the experience that they're looking for like you have the ability.

200

00:34:30.810 --> 00:34:37.260

Lisa Vander: To get to their pain points differently or undercover differently, because of the relationships are already developing with them.

201

00:34:37.650 --> 00:34:42.570

Lisa Vander: So how are you getting to that point I am we talked about a little bit at lunch with the group oh sitting with but.

202

00:34:43.080 --> 00:34:50.820

Lisa Vander: We talked about like the client advisory board or having like the client feedback sessions and doing a one by one and taking them and, like saying like hey.

203

00:34:51.090 --> 00:35:00.480

Lisa Vander: I want to get real vulnerable about my business and ask you some questions about it, like



here are the things like I work with a lot of clients like you hear some of the things that i'm doing like How does that show up in your world again to.

204

00:35:00.720 --> 00:35:13.260

Lisa Vander: stuffs point, like the research based of like here's how that's happening here's what i'm doing in the business so that you're getting an opportunity to deepen and share what you do, but I still feel like i'm competing against like their army.

205

00:35:13.680 --> 00:35:16.500

Lisa Vander: And then their marketing collateral like like they they're gonna you know.

206

00:35:22.710 --> 00:35:29.820

Lisa Vander: yeah but we're all in zoom now right so it's a little different, so I would, I would just suggest that maybe you don't.

207

00:35:30.360 --> 00:35:39.240

Lisa Vander: It might be also like a limiting belief, to some extent to like here's the big people they have more to offer you have more to offer you have probably a lower client ratio.

208

00:35:39.570 --> 00:35:46.950

Lisa Vander: To client than they do from that standpoint, so I think going into those relationships with more confidence with it, too, because.

209

00:35:47.280 --> 00:35:57.420

Lisa Vander: I don't I don't think you know i've never felt like I had to worry about competing against a Maryland independent has way more I mean you're just not bias you there's so much more not that if there's anybody here Marilyn.

210

00:35:57.930 --> 00:36:13.110

Lisa Vander: I don't want to be offensive, but I just think you've got a lot to offer I know your practice you're doing a lot of great things, so I would especially now that we're all like a zoom and virtual environment and nobody's using collateral and things like that I think you can be.

211

00:36:17.550 --> 00:36:27.360



Lisa Vander: yeah I really feel the same way, like I don't really feel like i'm in competition and honestly if they want the Goldman they don't want entrepreneur aligned like we're so different.

212

00:36:27.660 --> 00:36:33.270

Lisa Vander: In the experiences that we're offering and the depth in which we're serving and so.

213

00:36:33.990 --> 00:36:41.220

Lisa Vander: there's going to be levels like there's clients that sometimes go that way and i'm like that was meant to be right, like but I don't feel like.

214

00:36:41.910 --> 00:36:46.440

Lisa Vander: The areas that we're getting opportunities from or the doors that are being opened for us.

215

00:36:47.130 --> 00:36:53.880

Lisa Vander: Like we're showing up really strong in those so I don't fear somebody else's marketing budget again i'm not looking to serve.

216

00:36:54.180 --> 00:37:06.480

Lisa Vander: A majority of the population if entrepreneurial and conserve 250 entrepreneurial families like we've changed the corner from our corner of the world we've done exactly what we're looking to do so super selective about who gets on our bus.

217

00:37:06.870 --> 00:37:12.000

Lisa Vander: I would look at the Dan allison referral program to for the survey as well yeah.

218

00:37:14.040 --> 00:37:19.170

Lisa Vander: you're right now hi questions for steph actually is, when you were mentioning that you.

219

00:37:20.310 --> 00:37:28.710

Lisa Vander: were approaching some of the the target clients and just really trying to understand their pain points and interviewing them how did you.

220

00:37:30.630 --> 00:37:39.540

Lisa Vander: How did you approach could you talk go a little deeper as to how you actually made that



approach to them and let them know hey here's not selling.

221

00:37:39.870 --> 00:37:48.840

Lisa Vander: I want to understand what what you're all about what your pain points are, how did you go about presenting that so that they agreed to sit down and meet with you.

222

00:37:51.000 --> 00:37:56.400

Lisa Vander: yeah, so I think the first place, you might start So if you are serving.

223

00:37:56.970 --> 00:38:02.250

Lisa Vander: Lawyers in DC you, you might just start with one of your lawyer friends and say.

224

00:38:02.550 --> 00:38:09.990

Lisa Vander: You know i'm looking to talk and get some research is there, somebody that you know who I could sit down with for 30 minutes, I promise i'm not trying to sell them anything but.

225

00:38:10.290 --> 00:38:14.550

Lisa Vander: You know I love working with you i'm trying to figure out what other pain points people have.

226

00:38:14.820 --> 00:38:20.580

Lisa Vander: And you could sit down and have the same you can brought them through the conversation you're going to have with that person, so they understand it as well.

227

00:38:21.060 --> 00:38:26.100

Lisa Vander: I would also look on linkedin see if there's anybody connected to the people you want to sit down with.

228

00:38:26.400 --> 00:38:33.420

Lisa Vander: anytime you run into anybody who's in that group have a conversation and say hey Would you mind if you say, could you help.

229

00:38:33.780 --> 00:38:41.250

Lisa Vander: Nobody says no right if you just say Can you help me i'm doing some research on this and



here's why i'm doing it.

230

00:38:41.550 --> 00:38:51.780

Lisa Vander: So you've just got to kind of get out there and make those connections, but if you already have some of those clients that might be a place to start and then, when I would do one of those at the end, I would say.

231

00:38:52.230 --> 00:39:02.880

Lisa Vander: Is there anybody else that you think would be good for me to talk to because usually they're like Oh, you need to talk to so and so or something like that or yeah one of my partners might be willing to sit down with you for a few minutes or something like that.

232

00:39:03.570 --> 00:39:09.840

Lisa Vander: So yeah That was a huge way and how we started to build entrepreneurial lined up I spent.

233

00:39:10.680 --> 00:39:21.000

Lisa Vander: I had it where I needed to have five lunches a month with entrepreneurs and just ask them questions it's where a lot of our messaging came up it's where I understood, where the conflict between.

234

00:39:21.300 --> 00:39:28.320

Lisa Vander: Why they didn't work with financial advisors I just sit there and listen to a lot of like why entrepreneurs did not like financial advisors.

235

00:39:28.590 --> 00:39:37.590

Lisa Vander: Because we only call upon them when they're have a liquidity event and we don't care, otherwise a lot and the conflict of interest right like well.

236

00:39:38.100 --> 00:39:50.490

Lisa Vander: turns out i'm your best client in 20 years because I didn't build my wealth through the public markets So how are you guys here saying that this is the way to do it right like sitting there and taking that and i'm like oh like key message.

237

00:39:51.300 --> 00:39:56.430

Lisa Vander: You know, we changed our fees, so that we no longer sit in a seat of conflict of interest.



238

00:39:56.820 --> 00:40:02.940

Lisa Vander: Like Oh, like you, don't have to burn out was existing upon these entrepreneurs, like you, guys all became captive to your own creation.

239

00:40:03.420 --> 00:40:11.070

Lisa Vander: Oh traditional wealth management has failed you while my destiny capital side is traditional wealth management right it's like so i'm sitting there and i'm like oh it's totally failed you.

240

00:40:11.460 --> 00:40:17.220

Lisa Vander: And i'm like but it turns out, it didn't feel 90% of the population right and that is some there's a place for that to serve.

241

00:40:17.460 --> 00:40:22.080

Lisa Vander: But the 10% who's taking risks that are different than you, it has and we're here to solve that problem.

242

00:40:22.320 --> 00:40:34.740

Lisa Vander: And so it's a really interesting way again through research and questions to start to understand where the problems exist, how you differentiate yourself and the key question always Center of influence and prospects.

243

00:40:35.310 --> 00:40:44.250

Lisa Vander: Anything is hey who are like two really other important people that I can talk to, and I am like just continue my research Center of influence, who are two other professional partners.

244

00:40:44.460 --> 00:40:54.570

Lisa Vander: That you work with that you just love and why is that would you be willing to make those introductions just keep asking and they continue to show up and you continue to get the opportunities, people are willing to help.

245

00:40:54.900 --> 00:41:01.770

Lisa Vander: And I would also add don't limit it to just financial like you might just say as i'm broadening my services, I want to make sure i'm serving this.

246



00:41:02.070 --> 00:41:07.260

Lisa Vander: What are two things that would make your life really easier, you know, like it might be knowing a personal.

247

00:41:08.070 --> 00:41:22.080

Lisa Vander: trainer it might be a personal assistant service, it might be a food delivery, you know what are two things that might make your life easier and so you can talk about I want really want to broaden my services so that my clients have good resources or relationships for that yeah.

248

00:41:23.880 --> 00:41:31.680

Lisa Vander: turns out a lot of Center of influence don't know how to run like business development, networking, so I give them my Center of influence stuff like hey.

249

00:41:31.890 --> 00:41:38.580

Lisa Vander: here's like the three meetings setup and agenda so that you can continue to deepen that or they don't have certain things that business planning.

250

00:41:39.060 --> 00:41:53.640

Lisa Vander: you sit down and do business planning with part of you know, and like just continue again how are you showing up authentically and uncovering so that you have ways to be in service and add value and they think of you, and you get opportunities you're seeing.

251

00:41:55.620 --> 00:42:06.990

Lisa Vander: What I just said, being a capable contributor So these are just all the areas in which i'm contributing like it was really meaningful to me and really important to me to give back to other advisors.

252

00:42:07.710 --> 00:42:19.170

Lisa Vander: One of our internal mission is to create an environment where talented people can thrive and I wanted to do that at more than an organizational level, and I was doing that one by one by one, when stuff was like please come in coach and.

253

00:42:19.530 --> 00:42:23.670

Lisa Vander: Because I can't keep taking mentors or mentees underneath me like I was burning out.

254

00:42:24.510 --> 00:42:34.110



Lisa Vander: On the soccer field right like i'm being like hey we should join that tournament and don't worry like what if I took the lead and like doing a fundraiser so it didn't have to come out of anybody's pocket.

255

00:42:34.650 --> 00:42:45.750

Lisa Vander: Naturally, showing up and i'm also showing a little bit about money, what do you do for a living oh like I own a wealth management company, but I love this stuff like I just can't wait to be there for the kids and contribute more and those types of things.

256

00:42:46.560 --> 00:42:55.530

Lisa Vander: Women events and just showing up where I really it really matters to me in the Community, so any opportunity I get again it's not an event.

257

00:42:56.040 --> 00:43:09.780

Lisa Vander: it's a habit like if you're committed to the growth and finding the prospects and showing up to serve and what excites you one it doesn't feel like work and number two you gave me opportunities but consistently going out there and showing up in those spaces.

258

00:43:14.430 --> 00:43:18.000

um do you want to add to this one like i've been talking about.

259

00:43:24.630 --> 00:43:27.060

Lisa Vander: So this is where it's.

260

00:43:28.110 --> 00:43:35.970

Lisa Vander: hey like you experience matters when you're working with high net worth professionals they're going to check you out they're going to make sure that you're legitimate.

261

00:43:36.450 --> 00:43:42.510

Lisa Vander: And so it's not a matter of just like having the right message in the story it's also the ability to back that up.

262

00:43:42.870 --> 00:43:49.020

Lisa Vander: So where can they find you to ensure when they're doing their research, because they do, and they will.



263

00:43:49.380 --> 00:44:01.590

Lisa Vander: That you're being validated in the things that you're doing so your content needs to support that your website needs to support that the way you're showing up on linkedin like I am amazed, how many people look to see what might linkedin connections look like.

264

00:44:02.730 --> 00:44:08.760

Lisa Vander: And like they look at numbers like there's a status aspect to it like there's like a WHO you're connected to.

265

00:44:09.090 --> 00:44:15.600

Lisa Vander: And the last questions like hey I saw you were connected to this person, how do you know them right like there's a level of like testing.

266

00:44:15.990 --> 00:44:23.580

Lisa Vander: On what's your real experience and how are you truly connected to this Community oh like, how do you know that person, what did that look like.

267

00:44:24.510 --> 00:44:31.770

Lisa Vander: And so, for me, like a gun and being authentic every time in front in front of, especially the women entrepreneurs, because of how for eternal that is.

268

00:44:32.610 --> 00:44:49.170

Lisa Vander: Honestly nationally, but like certainly in Colorado where we're starting our base, like, I know that I have to show up really well because that person's talking to this person over here and i'm consistently being checked upon to ensure that what entrepreneur line does and how it serves.

269

00:44:50.280 --> 00:44:58.140

Lisa Vander: is being shared so we know that has to show up and client experience right, so the clients that we have that are entrepreneurs when they're out in the Community sharing.

270

00:44:58.410 --> 00:45:07.470

Lisa Vander: That we're validating their as leaders of the firm that were validated there when we say we're showing up as Community events that we're giving like we just can't drop the ball so.



271

00:45:07.860 --> 00:45:18.840

Lisa Vander: it's really important like on if it's somebody who is on the earlier side of like their simulation they're just coming out and they're like hey I want to buy my first House and all that stuff they're probably not going to that extent.

272

00:45:19.170 --> 00:45:26.700

Lisa Vander: to validate did it sound good enough for them to make the decision yeah when we're talking 10 \$20 million in net worth.

273

00:45:27.150 --> 00:45:33.090

Lisa Vander: They want to know what you're saying exists and that the value is there before they'll make a decision it's not fast.

274

00:45:33.720 --> 00:45:43.980

Lisa Vander: yeah and i'll I will just back that up credentials do manner for high net worth they are looking at that, to make sure they're dealing with the right people won't get you the job right, but they are looking make sure you have those credentials.

275

00:45:44.760 --> 00:45:53.820

Lisa Vander: What I did when I had a solo firm is I did a lot of just videos that I could do myself on my phone I learned how to edit them, which was pretty simple.

276

00:45:54.210 --> 00:46:04.140

Lisa Vander: And I would post them but linkedin right here's three things you need to know about the two tax laws here's a difference between a traditional IRA and a rollover IRA try and keep them quick and down.

277

00:46:04.830 --> 00:46:13.200

Lisa Vander: You can also work with you know, a marketing group, like trying get 10 or 12 people, maybe your coi group.

278

00:46:13.470 --> 00:46:21.870

Lisa Vander: together and on Thursday mornings you all go in and comment on each other's posts, so that you can kind of get the rankings up a little bit that's a good way to do it it's a lot of work.



279

00:46:22.230 --> 00:46:28.830

Lisa Vander: But it is also something if you can do it consistently and show up so when that person goes through your linkedin fee they see.

280

00:46:29.190 --> 00:46:37.320

Lisa Vander: This great video that they find informative, so it should again be towards your audience and if you're doing that research that's a perfect one, to take out one of those questions and say.

281

00:46:37.620 --> 00:46:44.670

Lisa Vander: You know i've been interviewing DC lawyers and they are telling me this is their biggest challenge well here's some thoughts on that blah blah blah blah.

282

00:46:44.910 --> 00:46:51.660

Lisa Vander: And then, all of a sudden you've got comments from all of your group, people say Oh, this is great or this is good oh I just so enjoy working with you.

283

00:46:51.900 --> 00:46:56.070

Lisa Vander: I mean it's it's a lot of work it's one of the reasons I joined the show well because I don't want to do it.

284

00:46:56.460 --> 00:47:01.230

Lisa Vander: But, but it does help, and it does validate you in that marketplace and it can be done.

285

00:47:01.560 --> 00:47:12.060

Lisa Vander: yeah how are you serving your own mission, are you an example of it like if our if we exist to help entrepreneurs live a remarkable life during and after their entire entrepreneurial journey.

286

00:47:12.540 --> 00:47:20.460

Lisa Vander: Then I have to show that Wednesday status, where i'm at my kids school and not working right like i'm on that hike because I have personal agency.

287

00:47:20.670 --> 00:47:37.560

Lisa Vander: And Oh, by the way, I was also at that event that really mattered for other entrepreneurs and Oh, by the way, I was also at the investment group, like i'm learning to become the influencer that I



never wanted to be right, because i'm trying to validate that what we do one i'm living proof.

288

00:47:38.700 --> 00:47:43.980

Lisa Vander: And it's hard like i'm not always living proof like I have aspirations to be where some of my clients are.

289

00:47:44.700 --> 00:47:48.450

Lisa Vander: But it doesn't matter i'm taking the steps to do it, just like I want any of our clients to.

290

00:47:48.810 --> 00:47:56.160

Lisa Vander: And to if they searched me they'll see it and they'll see podcasts that i've been on right like there there's industry respect.

291

00:47:56.430 --> 00:48:08.400

Lisa Vander: There is the ability to be a working mom and consistently with my kids on top of consistently contributing to the Community on top of hanging out with my clients and doing VIP events like.

292

00:48:08.700 --> 00:48:19.920

Lisa Vander: That matters and it matters in particular to the clients that we're serving their fraternal and they are really, really like they hold it tight on who they let in.

293

00:48:20.310 --> 00:48:27.480

Lisa Vander: right because there's a lot of people that are attracted to entrepreneurs and how to service them and so like it is really important.

294

00:48:27.720 --> 00:48:34.260

Lisa Vander: That i'm showing up in a very different way to those communities, the same is true when I was working with women dealing with the loss of a spouse.

295

00:48:34.680 --> 00:48:54.330

Lisa Vander: Right, like, I have not lost a spouse, so I knew I could never walk in their shoes and totally connect there, so I went and sat with a psychologist that works in women dealing with loss, there is a spa that is owned by a widow that specifically does self care for women caregiving.



296

00:48:55.440 --> 00:49:03.480

Lisa Vander: To those who are terminally ill as well as service after that, like those were really good places for me to be and learn and commit to.

297

00:49:03.660 --> 00:49:10.680

Lisa Vander: How it is to serve these women and like understand the Ted talks that were really important that are good things that I can send forward when.

298

00:49:10.980 --> 00:49:17.610

Lisa Vander: I know that somebody's ready to hear that message, how do I know when they're ready to see that might hear that message, because everyone grieves differently.

299

00:49:17.940 --> 00:49:25.050

Lisa Vander: Well you've learned the types of questions you can ask you, you know you don't ask a widow, how are you do you know you ask them how are you in this moment.

300

00:49:25.320 --> 00:49:32.220

Lisa Vander: Because it changes moment to moment, like those are all things that you learn when you embed yourself in the Community, and you understand what they read.

301

00:49:32.430 --> 00:49:43.740

Lisa Vander: You understand what they're going through and it allows you to show and be connected so there's a lot of work in showing up and getting high net worth prospects widows are incredible clients.

302

00:49:44.070 --> 00:49:55.110

Lisa Vander: Because they are they're loyal and they're open and they're just processing so much and typically like there's a high level of wealth and complexity there that just needs help.

303

00:49:56.250 --> 00:49:59.010

Lisa Vander: And they're very vulnerable to a lot of.

304

00:50:00.780 --> 00:50:10.260

Lisa Vander: showing up in the wrong place and and and we really do have a duty and servicing them, and so, how do you get there, and how do you do that, and then, how do you create the Community.



around it and again.

305

00:50:10.680 --> 00:50:17.640

Lisa Vander: Like they're usually connecting with other people there's groups that they're connected to that bring in other people, and you get to be a part of all of that.

306

00:50:18.060 --> 00:50:21.720

Lisa Vander: And I will just add does tiffany touched on something earlier but we.

307

00:50:22.110 --> 00:50:29.700

Lisa Vander: show up as yourselves to write high net worth people want to see who you really are they don't want just want to see the name on the brochure so.

308

00:50:30.030 --> 00:50:33.990

Lisa Vander: that she mentioned be okay to be vulnerable and share personal details.

309

00:50:34.320 --> 00:50:44.190

Lisa Vander: With these prospects or on linkedin or you know, whatever mode that you're going into like my clients know my details they know my highs and lows.

310

00:50:44.460 --> 00:50:52.320

Lisa Vander: So we asked them to share a lot with us and we need to be able to share with them, and once they do that, that that makes that relationship more trusted.

311

00:50:54.780 --> 00:51:06.030

Lisa Vander: And then follow through to cultivate the connection, you will hear this so much less than a bit of say it for the third time, it is a habit, it is not an event like you have to do what you say you're going to do.

312

00:51:07.350 --> 00:51:19.020

Lisa Vander: The equity like deposits or credit or debit it's like when you debit it takes three deposits to even get it back and devotee from an entrepreneur for me like it's like the kiss of death, like.

313

00:51:19.410 --> 00:51:24.420



Lisa Vander: I have to deal, it, I have to nail it like I have to show up and do what I said I was going to do.

314

00:51:24.840 --> 00:51:34.950

Lisa Vander: If they asked me to be a referral to a potential client I need to make time and take that phone call if they you know, like make sure that i'm setting them up straight so.

315

00:51:35.220 --> 00:51:44.700

Lisa Vander: Make sure that if you say you're going to do something in a meeting and you meet with them that you quickly do it time is also on your side from the follow up like.

316

00:51:45.210 --> 00:51:49.890

Lisa Vander: it's still being on your list, but it being there seven days later, like that the debit.

317

00:51:50.280 --> 00:51:56.970

Lisa Vander: Right like create space and time to be effective in the strategies that you're utilizing so that you can do them well.

318

00:51:57.330 --> 00:52:03.750

Lisa Vander: build the process that allows you to be successful in it, make the system stronger than the task so you don't fail.

319

00:52:04.170 --> 00:52:13.770

Lisa Vander: In what you're delivering and how you're approaching it if you say you're going to be at an event don't bail it's like the worst thing you can do so if you don't want to go to the event say no up front.

320

00:52:14.400 --> 00:52:24.780

Lisa Vander: Like don't make the commitment and then have some weird excuse to back out of it, like those things show up really quickly reputation as well as in relationships and again.

321

00:52:25.410 --> 00:52:33.210

Lisa Vander: High net worth prospects they're watching your every move like there the entire time they're they're looking into that relationship.

322



00:52:33.540 --> 00:52:44.700

Lisa Vander: And, most of the time, by the time we get our high net worth prospects in there's no sale like it's already happened this the same way, like following a podcast where they're listening to you and it's like they know you the entire time so by the time you connect.

323

00:52:45.060 --> 00:52:48.780

Lisa Vander: there's no sale, they already made the decision, they already bought before they came in.

324

00:52:49.230 --> 00:52:58.770

Lisa Vander: that's a lot of what we're doing with high net worth prospecting like we're just connecting their buyers before they actually give us the opportunity to talk to them so.

325

00:52:59.040 --> 00:53:09.780

Lisa Vander: The prospecting process is relatively easy because we already know a lot now we're just getting a little bit deeper into the personal side typically we're getting the opportunity to need a spouse that we haven't been able to meet in the past.

326

00:53:10.830 --> 00:53:19.830

Lisa Vander: But if I don't do what I say i'm going to do, like momentum stops quick and I have failed on both sides and i've succeeded, and I fail on that as well.

327

00:53:20.370 --> 00:53:26.820

Lisa Vander: yeah, I just wanted to add to one thing that I didn't mention is when I was doing those interviews.

328

00:53:27.390 --> 00:53:35.310

Lisa Vander: For my target audience at the end, I would say, you know, and I just would love to know what Charity is your favorite charity, or something like that, for the planning.

329

00:53:35.670 --> 00:53:42.000

Lisa Vander: And then, what I would do is make a donation to that charity in that person's name so to give something back to them, I was dealing.

330

00:53:42.270 --> 00:53:46.140



Lisa Vander: At that point in time, with executives, who are really busy so they're giving their time so.

331

00:53:46.560 --> 00:53:55.230

Lisa Vander: You know, we do that interview, but then they're going to get a letter now from the charity that shows that you made a donation their honor to so that's another touch point with that person and that's a.

332

00:53:55.530 --> 00:53:59.730

Lisa Vander: No pretty low entry point to having a relationship with someone.

333

00:54:00.210 --> 00:54:08.100

Lisa Vander: I love, like the system is strong, that you can do the specialized touches there's so many fun things you can do just picking up like the conversation of like.

334

00:54:08.520 --> 00:54:16.590

Lisa Vander: Going on vacation next month, like and they happen to be going to the beach, and you send a beach towel and some flip flops and you're like hey I hope you have a really great vacation like.

335

00:54:16.830 --> 00:54:25.620

Lisa Vander: Solid touch, but how do you have the opportunity to do that if you don't have the system to show up and consistently follow up because, otherwise, like those are all the great ideas.

336

00:54:25.860 --> 00:54:33.570

Lisa Vander: That get lost on your drive back to jump right back into client experience or something else, so you have to have the system where that specialized touch can land.

337

00:54:33.900 --> 00:54:41.040

Lisa Vander: And then the ability to get it out the door, but those things those things are like really big like people care like Oh, you heard me.

338

00:54:42.000 --> 00:54:51.210

Lisa Vander: I had one where they never take family pictures and I found a photographer doing many sessions for \$50 right and paid for it and.

339



00:54:51.750 --> 00:55:01.500

Lisa Vander: worked with their assistant and booked it for their family, do you know, every time they look at that family picture, who they think of like that things last forever they have that on their wall at their house.

340

00:55:01.950 --> 00:55:04.560

Lisa Vander: Right like super cool things that you can do.

341

00:55:05.010 --> 00:55:17.820

Lisa Vander: And that stuff matters in the high net worth like prospecting because they they get VIP treatment in a lot of different ways, and so, how do you create that specialized touch again when you know who you serve, you can think about that differently to and do it more in bulk and scale.

342

00:55:19.230 --> 00:55:22.200

Lisa Vander: Two questions first what kind of response, do you.

343

00:55:22.710 --> 00:55:31.680

Lisa Vander: Get from them, you know when they received a letter from a maturity, they give you a call or how is that, how is that gone and then secondly, what kind of system, do you have in place to be sure.

344

00:55:32.070 --> 00:55:41.790

Lisa Vander: Like you record the information about the beach, so you can send them the information How does that fit into the process, maybe you're going to get there that's a great question stephanie do you want to answer the first one.

345

00:55:42.720 --> 00:55:53.700

Lisa Vander: yeah so I usually got a thank you note from that person That said, oh Thank you so much, you know I really enjoyed meeting you and how nice of you to do that I really meant a lot to me, you know so yeah.

346

00:55:54.720 --> 00:56:01.530

Lisa Vander: So we record it in the CRM we have the fields that exists from like a deep discovery standpoint for our Center of influence.

347

00:56:02.460 --> 00:56:10.230



Lisa Vander: I am sure it's on resources somewhere from a couple of years ago, if not i'll definitely send it I used to do it on a on a word Doc, and so I had.

348

00:56:10.560 --> 00:56:15.750

Lisa Vander: Like in the business stuff and then like the personal stuff about like what was the College they went to.

349

00:56:16.140 --> 00:56:25.500

Lisa Vander: Like are they like right now who's into march madness and who's their team like totally take that down one bring it up in conversation two colors sweatshirts huge hit.

350

00:56:25.770 --> 00:56:32.790

Lisa Vander: Like you know so just those things, but when i'm coming back from the meeting when I had the word Doc it was just a matter of like i'd hand write it.

351

00:56:33.600 --> 00:56:39.090

Lisa Vander: and eventually go back and fill it in, and I just put an updated date on it, of what was coming out but I.

352

00:56:39.630 --> 00:56:49.590

Lisa Vander: Even with the advisors in our clients like i'm like what's three new things you can learn about them that's outside of their wealth planning right, so you have your wealth mapping and then you have your deep connection.

353

00:56:49.950 --> 00:56:53.580

Lisa Vander: And i'm just looking into areas like who are the most important people to them.

354

00:56:54.300 --> 00:57:03.420

Lisa Vander: Animals pets are always huge you can do a bark box if they're really big into their dogs right like anything like that subscriptions are awesome if it hit some three months in a row gosh.

355

00:57:03.750 --> 00:57:09.450

Lisa Vander: And it costs like 10 bucks vs send something in three months, like they never forget it, and you hit him three consecutive times.



356

00:57:09.810 --> 00:57:17.610

Lisa Vander: And so it's just a matter of hitting a system what's cool about the CRM versus a word Doc is that then can implement a workflow.

357

00:57:17.970 --> 00:57:27.000

Lisa Vander: right that naturally goes to my executive assistant just got tagged for the gifting and then you can have gift ideas that naturally come up so she doesn't even have to think i'm like.

358

00:57:27.270 --> 00:57:34.830

Lisa Vander: Oh, if it's this event we do one of these three things right if it's this one we go to etsy and get the piggy bank with the little baby's name on it.

359

00:57:35.070 --> 00:57:40.410

Lisa Vander: And it gets real sent out so you can keep it and make it a full system so that it goes, all the way through.

360

00:57:41.220 --> 00:57:51.300

Lisa Vander: But if you don't have the CRM or the workflows or you just need to start simple just use that worksheet and just fill it in and keep it in a file and pull it back out every time you have lunch with them or.

361

00:57:52.020 --> 00:58:06.690

Lisa Vander: The next time you're seeing them or if you're sending them a personalized article like hey I happen to notice that, like I don't know Russell Russell Wilson got traded to the broncos like that's a really big deal right she's she's from Washington i've never.

362

00:58:08.430 --> 00:58:25.170

Lisa Vander: um and like you know just whatever you can just be like Oh, they remember me or they get me or they know me anytime you can add that connection I see you I hear you I know you I understand you like credit.

363

00:58:26.430 --> 00:58:35.280

Lisa Vander: yeah and when I was a solo firm and had to do a lot of this myself, I would just make sure a calendar blog on Friday so that's when I wrote the Thank you notes and I did a lot of this follow up myself.



364

00:58:35.580 --> 00:58:42.000

Lisa Vander: So, send a thank you note to whoever I interviewed as well, so they're getting another touch point, aside from the letter that they're getting from the charity.

365

00:58:42.420 --> 00:58:48.210

Lisa Vander: And, and you know, do everything, then that that will make sure, even if you don't have all the technology built yet.

366

00:58:48.570 --> 00:58:56.760

Lisa Vander: i'm a big fan of technology, but if you don't have it built I always say still do it don't let the technology limit you just Center you know build a system around it yeah.

367

00:58:57.510 --> 00:59:08.520

Lisa Vander: And when it comes to like the women stuff anyone else, focusing on women like I use this jewelry it's called threads that it's women from like really remote villages that build the.

368

00:59:09.540 --> 00:59:16.710

Lisa Vander: The jewelry and then they get they get a fair wage in order to do so, and then it's sold through like a third party.

369

00:59:16.920 --> 00:59:26.010

Lisa Vander: I mean that's great for my women's groups who are supporting other women and want to be a part of it right like that natural story of what that jewelry is it comes with the story it tells you about the artists.

370

00:59:26.250 --> 00:59:37.470

Lisa Vander: Who created it where they're from and all that stuff huge like it's just a huge opportunity and a follow up so gifting and this those specialized touches really big when it comes to relationship building.

371

00:59:38.160 --> 00:59:42.690

Lisa Vander: Especially when people are driven with like the impact and the things that are happening in our world.



372

00:59:44.670 --> 00:59:45.060

Lisa Vander: yeah.

373

00:59:52.440 --> 01:00:01.230

Lisa Vander: One thing we've kind of struggled with a little bit with the gifts is just the gifting limits yeah you do anything to kind of keep track of that or how do you keep that in mind, because we did like.

374

01:00:02.400 --> 01:00:11.250

Lisa Vander: Like I think when we can find the cheap gifts they that are great like I think I don't know if it was your idea but somebody in September had the bomb was socks idea for somebody going into the hospital.

375

01:00:11.880 --> 01:00:17.640

Lisa Vander: And we did that, like it just happened to happen, like a month later, Guy with cancer was going to the hospital, we sent those.

376

01:00:18.030 --> 01:00:21.840

Lisa Vander: Oh, my wife responded, how did you know we always have cold feet, all this stuff and.

377

01:00:22.260 --> 01:00:31.440

Lisa Vander: I mean it went you know really far but there's all those limits and so we're trying to do a bunch but yeah does the charity thing, though, that doesn't count towards any limits I kind of like that idea right.

378

01:00:32.880 --> 01:00:34.440

Lisa Vander: Right right yeah.

379

01:00:34.830 --> 01:00:39.000

Lisa Vander: yeah So is there anything special you do to try and plan it out or anything yeah so.

380

01:00:39.090 --> 01:00:48.840

Lisa Vander: um, as I mentioned in building the workflows like we're like when you know who you're working with and the light of like the events that are coming up right like the day after they close and selling their business.



381

01:00:49.140 --> 01:00:59.190

Lisa Vander: is a really weird day for a business owner, even if there's an equity buyout like what should we be sending that day to know and acknowledge the event that they just went through.

382

01:00:59.670 --> 01:01:09.120

Lisa Vander: Right like what happens when they get their first equity partner or they you know those types of things like we think through those things but yeah so for us.

383

01:01:09.390 --> 01:01:17.430

Lisa Vander: And then of course we have like the retirement stuff and the new babies and the graduating grandkid and all that stuff and if you can spend time.

384

01:01:18.510 --> 01:01:19.620

Lisa Vander: If you can spend time.

385

01:01:20.280 --> 01:01:28.260

Lisa Vander: Just make a list and we try to put three gifts in each one of those categories, so our systems don't have to think about it, or a client specialist don't have to think about it, and they can go.

386

01:01:28.440 --> 01:01:36.540

Lisa Vander: We already know that their compliance approved so and it goes through a quick 15 workflow so it naturally hits compliance and they can send it without any problem.

387

01:01:36.750 --> 01:01:49.740

Lisa Vander: So I would say to make it easy there's probably a project there that's probably two hours of somebody's time to say as a firm here the gifts that we send when these types of things show up so then it's never a thought and it's just done.

388

01:01:50.610 --> 01:02:00.570

Lisa Vander: yeah in a simple gift log will do it, I mean ideally in your CRM and then you can track aggregated gifts if you're already a that limits pretty high I mean, I think I mission our limits like 250 so.

389

01:02:00.960 --> 01:02:08.370



Lisa Vander: Far it's gone and if your broker dealer I think it's still at the hundred yeah so so glad to remove that sucker yeah.

390

01:02:10.080 --> 01:02:13.560

Lisa Vander: yeah well i'll let you know I don't want any place you don't spend.

391

01:02:15.360 --> 01:02:26.010

Lisa Vander: yeah you know our favorite gift recently was olive oil and vinegar from Santa Barbara and I think it was like \$30 and people have raved over it, so you don't like you said to the socks.

392

01:02:26.280 --> 01:02:37.140

Lisa Vander: it's more than unique not just sending something with your logo on it to somebody from that standpoint yeah and don't underestimate the power of just sending a note and as a handwritten know or do something like that.

393

01:02:43.980 --> 01:02:46.050

Lisa Vander: Do you have any creative ideas around.

394

01:02:47.940 --> 01:03:00.150

Lisa Vander: harnessing the power of your clients knowing each other and getting to know each other, you know that that that Community other than it seems to be the obvious and in person networking event.

395

01:03:01.560 --> 01:03:07.410

Lisa Vander: outside of that and or in this virtual world how to get them we have people who we know oh it'd be.

396

01:03:07.980 --> 01:03:15.210

Lisa Vander: Great if they spend time with these other three clients of ours yeah any creative ideas around that yeah there's so many things you can do.

397

01:03:15.990 --> 01:03:25.470

Lisa Vander: If anyone has met Joe here, he doesn't incredible like whiskey thing that like he does a whiskey scalia and he's like hosted that over zoom where they're getting familiar with one another he's also done it in person.



398

01:03:25.770 --> 01:03:33.150

Lisa Vander: So I think there's certainly like those events we were talking about it earlier, but one of the my most favorite ways of bringing clients together.

399

01:03:33.420 --> 01:03:45.210

Lisa Vander: While also learning as a group, as a client Advisory Board, so you can naturally bring them together, where they're learning a lot more about you, but like if the series of three means and, at the end of those three meetings they've learned so much about each other.

400

01:03:46.200 --> 01:03:54.330

Lisa Vander: Personally, a little bit, but like how they're contributing what they care about and hearing each other's thoughts like there's such a level of respect there that they are naturally connecting.

401

01:03:54.990 --> 01:04:02.280

Lisa Vander: outside of that sometimes i'll take people to coffees and i'm just like I just needed to get the three of us together because I knew that there was something super special here.

402

01:04:02.640 --> 01:04:15.270

Lisa Vander: And I slowly like removed myself from that right like i'll take a phone call or do something along those lines or let them naturally connect and so there's a there's definitely that there's um.

403

01:04:17.220 --> 01:04:29.910

Lisa Vander: You can I mean you can I in person events are easier than the zoom zoom is getting a little bit better but it's so hard to like meet someone and connect over zoom and if there isn't like just.

404

01:04:31.500 --> 01:04:37.080

Lisa Vander: I don't know more of a natural way like i've done a dinners like executive dinners where i'm just like hey like everybody.

405

01:04:37.440 --> 01:04:48.720

Lisa Vander: I just wanted to bring everyone together we're just paying for a meal and I bring in a somebody that they can ask questions to and we're just there to pay the bill, but they naturally get to talk to each other and start learning it.



406

01:04:49.890 --> 01:04:53.610

Lisa Vander: And so, those are all different ways, I mean do you have anything additional.

407

01:04:54.090 --> 01:05:01.650

Lisa Vander: That is good, sometimes too, so if you've got a very specific audience, you might find a book, maybe that's something you read that you're really passionate about.

408

01:05:02.010 --> 01:05:08.400

Lisa Vander: Like a friend of mine did essentialism 4000 weeks is a really popular one right now to talk to me about just how much.

409

01:05:08.730 --> 01:05:18.450

Lisa Vander: Life we have left you know, and so you might say, hey I think it would be great I thought you you all might enjoy this book and I think you might enjoy knowing one another.

410

01:05:18.960 --> 01:05:27.360

Lisa Vander: How about we read the first five chapters of this book and come together i'd love to hear your ideas on it and talk about it yeah that's a really good one as well.

411

01:05:28.230 --> 01:05:38.610

Lisa Vander: So we are already in our in yeah I probably should go forward and then come back for more questions and working to help you guys work through some ideas that you're going to implement.

412

01:05:39.480 --> 01:05:52.500

Lisa Vander: I think three more that to invite and show up so just to the events that may resonate so I tend to we do host a few events, it takes a lot of work to host events and.

413

01:05:53.340 --> 01:05:59.970

Lisa Vander: Sometimes are wildly successful and sometimes they're not and so i've gotten really clear and i'm more strict about the events that we host.

414

01:06:00.270 --> 01:06:11.040

Lisa Vander: More so i'm looking for what type of events are already being hosted that we can show up, and I can bring or invite a crowd to go to so that it's already naturally hosted I don't have to worry about



any of the setup or whatnot.

415

01:06:11.310 --> 01:06:16.620

Lisa Vander: And I get the opportunities to connect with WHO i'm looking to connect with in a much smaller format.

416

01:06:17.190 --> 01:06:25.740

Lisa Vander: So that's a really great way to do invite and show up if you are doing events with Center of influence or anything else, one of the tricks that i've loved is that.

417

01:06:26.280 --> 01:06:34.830

Lisa Vander: it's not it's like it's always the worst we knew like bring all the people and then, like the other side doesn't you're like this sucks like this was supposed to be it, so I have a rule of.

418

01:06:35.430 --> 01:06:41.880

Lisa Vander: We each need to bring at least five, and if we don't the other person has to flip the entire bill, and then I will order extra.

419

01:06:44.160 --> 01:06:51.270

Lisa Vander: But that helps create some level of accountability to if we're going to drive these events, this is what matters and then also set the expectation.

420

01:06:51.780 --> 01:06:56.010

Lisa Vander: That if we can't do this successfully, the first time, then there's probably not a reason to do it again.

421

01:06:56.550 --> 01:07:08.340

Lisa Vander: Because events take a lot of time again, you can't work all strategy, so if you're going to host private events like you need to make sure that there's going to be an ROI there for you and how do you ensure that and how do you ensure that if you're sharing the event.

422

01:07:11.580 --> 01:07:19.950

Lisa Vander: I, the question was Have you ever charged your client or prospect to attend an event, and we have not yet, but we are actually working on that.



423

01:07:20.880 --> 01:07:32.490

Lisa Vander: Where we're going to host some more VIP things where it has a little bit of the travel and like we see like the investment bankers doing like heli skiing and, like all of those types of things where we're going to go to a fancier places.

424

01:07:33.210 --> 01:07:45.600

Lisa Vander: Where there will be a level of them pain to participate in that, and so the idea would be that we put it all together to create the experience, but they will be charged to come to those events.

425

01:07:46.560 --> 01:07:57.600

Lisa Vander: You know i've never charged I I find in Colorado I we always had trouble getting people to events like even client appreciation events there's just so much to compete with in Colorado I think yeah.

426

01:07:58.170 --> 01:08:04.500

Lisa Vander: But it had to be like a really good event, you know, like, I was able to get advanced tickets to like a museum opening.

427

01:08:04.950 --> 01:08:10.980

Lisa Vander: And so, everybody was going to be able to go see the opening, but the fact that I got him the first week we got group tickets with.

428

01:08:11.250 --> 01:08:12.990

Lisa Vander: A tour guide was pretty good.

429

01:08:13.260 --> 01:08:22.740

Lisa Vander: So look for those things that are really compelling if you're doing an event because I just think people are have a lot competing with them, especially now they're used to staying home they don't want to drive anywhere, so if you do that kind of event.

430

01:08:23.280 --> 01:08:27.750

Lisa Vander: I would just be careful and again that wasn't super high cost, I mean I did.

431

01:08:28.050 --> 01:08:35.160



Lisa Vander: We did do a reception with somebody else with one of them, and then the other one I said hey we're going to meet in the bar first for drinks and appetizers, but it was very limited.

432

01:08:35.460 --> 01:08:40.290

Lisa Vander: I picked up the check and then we went to tickets for the museum, or like \$30 apiece it wasn't very much so.

433

01:08:41.700 --> 01:08:51.150

Lisa Vander: i'll also add to just piggybacking on what tiffany said earlier about a client Advisory Board, I actually had a an advisory board it contain clients, but it was other people as well too.

434

01:08:51.540 --> 01:08:56.370

Lisa Vander: So this is again another place where I might interact with a coi or other people and say.

435

01:08:56.700 --> 01:09:04.470

Lisa Vander: Would you mind helping me you got to be very clear about the time commitment, because these are all busy people but did you say look i'm going to get you together for.

436

01:09:04.800 --> 01:09:14.130

Lisa Vander: You know, maybe twice a year to run some things by you and they then become very vested in your business, and I think, for me it was like when I was starting my own firm.

437

01:09:14.490 --> 01:09:20.160

Lisa Vander: like these are the people who gave me the confidence like they had so much confidence in me I knew I could go start my firm.

438

01:09:20.430 --> 01:09:30.900

Lisa Vander: The same thing with you, if they have confidence in what you're doing that's not only going to help you and be a sounding board for some of the things you're implementing but they're then going to be fierce advocates for you as well, too.

439

01:09:31.770 --> 01:09:48.240

Lisa Vander: yeah it's only way to do it the fact find conversationally so regardless of their events that you're using or a year in the environment in which your passion prospecting or all that again like you're looking to be authentic but there's always going to be opportunities to talk.



440

01:09:49.380 --> 01:09:56.400

Lisa Vander: Not jarvis used to always say like he used to do like the biking or whatever, and he used to always be like oh i'm just the money guy right like that was his thing and.

441

01:09:56.880 --> 01:10:02.820

Lisa Vander: And oh this isn't the environment we grab a coffee i'm just the money guy what do I know, like those used to be his his thing that he always said.

442

01:10:03.870 --> 01:10:06.420

Lisa Vander: Like anytime with it when it comes up for me.

443

01:10:08.880 --> 01:10:19.080

Lisa Vander: I mean, most of the time i'm just I mean the nice thing about connecting with so much with so many women is it's just like such a vulnerable open conversation about whatever we're going through, and so a lot of times it's like.

444

01:10:19.560 --> 01:10:32.370

Lisa Vander: Oh man like i'm going through this in the business or like we just solve this and, like i'm so grateful that I had the opportunity to do this as a firm blah blah blah, and they were just like oh my gosh like how did you do that, and so it's okay.

445

01:10:32.850 --> 01:10:40.410

Lisa Vander: Even in non soliciting environments is which I mostly show up in ipos non solicit ios non solicit tree spaces non solicit.

446

01:10:40.710 --> 01:10:48.180

Lisa Vander: Like i'm you know i'm not supposed to go to my brilliance group and like we're all there for life, coaching to solicit business like they're all non solicit but they're all opportunities.

447

01:10:48.870 --> 01:10:56.070

Lisa Vander: Like just connecting and i'm passionate about what I do i'm just sharing my story, and when they ask they're genuinely asking to get to know me.

448



01:10:56.340 --> 01:11:03.150

Lisa Vander: And then there's an opportunity to talk about the business and we do like i'm not ashamed of the business I do i'm just not there to sell it.

449

01:11:03.960 --> 01:11:14.610

Lisa Vander: yeah I think that goes back to a lot of what Carl was saying to you want to show up with curiosity, with people so, whether it be a prospect coi and there's a really good.

450

01:11:15.000 --> 01:11:23.070

Lisa Vander: lesson on the the library from our founder says streeter on conscious conversations you know, instead of saying what do you do it's sort of like.

451

01:11:23.520 --> 01:11:29.850

Lisa Vander: gosh what really fills you up about being a DC lawyer, you know, or when you're out one of your networking group, like.

452

01:11:30.150 --> 01:11:37.200

Lisa Vander: Tell me about this, it must be really exciting to do the kind of work that you do, what did you have to go through to get to the position you're in today.

453

01:11:37.530 --> 01:11:46.920

Lisa Vander: Those kind of curiosity conversations yeah oh my gosh that's amazing how did you solve that like what does that look like just a lot of those questions and the failure formula.

454

01:11:47.910 --> 01:12:02.760

Lisa Vander: Oh, my God they're \$20 million right like you're already starting by chasing the money, like you, didn't even get interested in them like they see that high net worth prospecting is just so different like they know if you're coming after them for the money.

455

01:12:04.140 --> 01:12:16.440

Lisa Vander: They are right there they've been approached 1000 times everybody's been after them for the money so like how are you differentiating yourself desperate for prospects again like it's like they can smell it.

456

01:12:17.550 --> 01:12:24.780



Lisa Vander: Like you know, like you're showing up and who wants to be in that position to be desperate for him again if we know who we're serving in the seats.

457

01:12:25.080 --> 01:12:35.700

Lisa Vander: Then it's either right, yes or no, and the decision is theirs, and we can't be attached to that, and if you are ever attached to it, you need to go and do the work on yourself because you're not in the right seat to serve them.

458

01:12:36.300 --> 01:12:44.460

Lisa Vander: So that's not the right formula to be desperate for prospects again how are you showing up and planting the seeds and understanding that, as you water them.

459

01:12:45.090 --> 01:12:55.140

Lisa Vander: Things will grow it'll come be consistent, make sure you're showing up, and you know misery few friends and zero clients.

460

01:12:56.010 --> 01:13:03.000

Lisa Vander: I happen to have misery, a lot of friends and zero clients, when I was going through it when I took this formula for a test.

461

01:13:03.570 --> 01:13:13.530

Lisa Vander: On my early days of where it was you could eat what you kill, and so I was totally chasing the money, I was super desperate for clients I happened to be showing up a lot.

462

01:13:13.950 --> 01:13:21.060

Lisa Vander: But I didn't know how to sell myself, so I made like a lot of friends who wanted me to say yes to a lot, they did, and I had no clients.

463

01:13:21.870 --> 01:13:31.110

Lisa Vander: And it was not the formula to work it wasn't clear they understood that the moment I got opportunities like this showed up in my prospecting process.

464

01:13:31.500 --> 01:13:42.810

Lisa Vander: And it was a know every single time, to the point that I was crying on like dude who do I buy shoes for like my son or my husband, and that was 2016 we're in a very different place now.



465

01:13:43.620 --> 01:13:50.220

Lisa Vander: So you have to make sure that you're super clear and you're good like you were just there to inform, so that people can make their decisions.

466

01:13:52.800 --> 01:13:53.670

Lisa Vander: And that's what that says.

467

01:13:54.960 --> 01:14:03.120

Lisa Vander: Be intentional selective selectively engage right don't be all things to all people know who you're looking to be around know where you want to be.

468

01:14:03.360 --> 01:14:08.940

Lisa Vander: know what you're excited to be at know what you're not excited to be at above the line below the line activities.

469

01:14:09.810 --> 01:14:18.120

Lisa Vander: and work on building relationships, this is not transactional if you find yourself in a transactional place you're not in the high net worth prospecting area.

470

01:14:18.600 --> 01:14:26.970

Lisa Vander: If you're in a transactional place it's like a really great place for like fidelity call Center right like you're there to sell and do what you need to do like.

471

01:14:27.210 --> 01:14:37.830

Lisa Vander: Be in a call Center and provide that opportunity and a super transactional you're never going to talk to them again if you're looking to have clients for 30 years you have to start it off right with building relationships.

472

01:14:40.410 --> 01:14:52.950

Lisa Vander: Here, all the things that you can do and look at make sure that you go to the passion prospecting so that you can continue to look through it says street or she's mentioned a couple of times.

473

01:14:54.000 --> 01:14:55.320



Lisa Vander: The untethered life.

474

01:14:56.340 --> 01:15:06.060

Lisa Vander: there's yeah seth seth amazing he's done Ted talks like he's done an incredible job really working into the high net worth community, but by doing it purely through impact and passion prospecting.

475

01:15:06.510 --> 01:15:15.030

Lisa Vander: He doesn't do anything he doesn't love so much that he naturally just creates connection because he's leading the charge of those areas.

476

01:15:16.890 --> 01:15:21.720

Lisa Vander: And then act, which is what we're going to do now.

